

Online Renewal System Checklist

The online session must be conducted by an agent authorized to sign on behalf of the organization.

- ☐ Charity Registration Status must be [Current](#) or [Current – Awaiting Reporting](#). Use the [Registry Verification Search tool](#) to verify status, look up previous and in-progress filings.
- ☐ IRS filing for the most recent full accounting period must have been submitted to the IRS. The Registry requires a copy of IRS Forms 990, 990-EZ or 990-PF including most schedules and attachments in PDF format. Note:
 - Schedule B is not required. **Please exclude Schedule B** from your IRS Form 990, Form 990-EZ or Form 990-PF filing.
 - If your organization is not required to file and does not file IRS Form 990 or 990-EZ because it does not meet the revenue requirements, your organization must submit [Form CT-TR-1](#) with the Registry (more details below).
 - The Registry does not require a copy of IRS Form 990-N.
- ☐ All data as required on [Form RRF-1 & Instructions](#). You will not need to upload the PDF itself.
- ☐ Written explanations to all "Yes" answers to Questions 1 through 7 and 9 in Part B of [Form RRF-1 & Instructions](#) are required in a separate PDF file. Question 8 is exempted unless the Registry specifically requests an explanation later. See [Tip: Creating a PDF File](#).
- ☐ If your organization is not required to file and does not file IRS Form 990 or 990-EZ with the IRS because it does not meet the revenue requirements, your organization must submit [Form CT-TR-1 & Instructions](#) in PDF format. The Registry does not require Form CT-TR-1 from organizations that file Form 990, 990-EZ or 990-PF. Suggested steps to make Form CT-TR-1 ready for upload:
 - Complete the form fields per instructions, typing directly into the fields.
 - The TOTALs fields are not editable - they are calculated based on what is entered in the fields above them. You may need the latest version of [Acrobat](#) for this feature.
 - The *Signature of Authorized Agent* field may be left blank when the form is submitted using the Online Renewal System. Your electronic signature that will be captured during your online session will constitute a signature on all attachments you upload to the system. Only an agent authorized to sign on behalf of the organization may sign during your online session.
 - For all PDFs you intend to submit, please be sure that they look as expected when opening with the latest version of [Acrobat](#). Some third party PDF creators are not fully compatible with Acrobat.
- ☐ **Do not include public and confidential documentation in the same PDF.** Have ready a separate PDF file for all **confidential** portions of your filing. Note:
 - Schedule B is not required. Please exclude Schedule B from your IRS Form 990, Form 990-EZ or Form 990-PF filing.
- ☐ All individual files to be submitted must:
 - Be 100% public or 100% confidential documentation. See previous bullet item.
 - Be in PDF format. See [Tip: Creating a PDF File](#).
 - Be fully viewable with the latest version of [Acrobat](#). Some third-party PDF creators are not fully compatible. Please check by opening each PDF with Acrobat before attaching them.
 - Be no more than 6 MB each. See Tip: [Reducing PDF File Size](#).
 - Not be password protected. They will be deleted.
- ☐ As of January 1, 2022, all registrants must pay a non-refundable Renewal Fee regardless of total revenue. The Fee Schedule is on the first page of [Form RRF-1 & Instructions](#). It must be paid online using either a checking account (ACH) or credit card at the time of online submission. For ACH, there is no additional fee

and you will need your banking information including account and routing (ABA) numbers. Payments by credit cards will include an additional 2.3% fee (also non-refundable) charged and collected by the payment processor.

- ***Note about ACH payments:*** For those with ACH/debit blocks on their checking account, before submitting you must notify your bank to allow an ACH debit. The Registry/DOJ Company ID is 1082037180.

- ***All required documents and Renewal Fee payments must be submitted together at the same time.*** An incomplete renewal submission will result in a Registry Status of [*Current - Reporting Incomplete*](#) until all remaining, required documents and/or fee payments are received and processed by the Registry. You may not amend or update a submission using this system – amended filings must be submitted by U.S. Mail or email.

If all of the above are done, you are ready to [submit your filing](#).

If you do not already have a User ID & Password established, see [User ID & Password](#).

[Go to Login Page](#)